MASTER CONTRACT FOR IT SERVICES RFP# SPB08-1469P

EVALUATION AND RECOMMENDATION

October 16, 2007

PREPARED BY: DEPARTMENT OF ADMINISTRATION INFORMATION TECHNOLOGY SERVICES DIVISION

SECTION I - EXECUTIVE SUMMARY

A Request for Proposal (SPB08_1469P) seeking to add New Contractors to the existing Master Contract for IT Services and qualify existing Contractors in Service Categories in which they were not previously qualified, was prepared and released for competitive bidding on August 10, 2007.

Project Experience and References were sought in the following 13 Service Categories:

- Analysis, Design and Planning Services
- Business Process Management Services
- Distributed Application Services
- FileNET Services
- GIS Services
- Information Systems Security Services
- Internet, Intranet, and e-Government Services
- Mainframe Applications Services
- PeopleSoft Services
- Project Management Services
- Public Safety Services
- Quality Assurance Services
- Telecommunications Services

Offerors were allowed to submit responses for as many Service Categories as they felt qualified to provide. Each Service Category was scored independently. Responses were evaluated on organization of proposal, offeror qualifications, project experience, and references for each Service Category.

A Vendor Conference Call was held August 22. On August 29, clarification requests were received from various offerors. The State posted responses to the clarification questions on September 5. By September 14, the State Procurement Bureau received responses from 28 offerors. Each response was checked for compliance with the RFP's general terms and conditions.

SECTION II - PROPOSAL SUMMARY

A total of 28 proposals were received. The responsive proposals were subjected to a complete evaluation, which is summarized in this report. Full details of the evaluation are available from PSB upon request.

Total Proposals Received: 28

Total Number of Service Categories applied to by all Offerors: 87 Total Number of Qualified Proposals in all Service Categories: 66

The proposals submitted in the Public Safety and Telecommunications service categories failed to receive passing scores. Therefore, the State reserves the right to not award a contract in either service category (RFP Section 2.4, ARM 2.5.602).

Proposal Matrix

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	Offeror	Analysis, Design, & Plan	Business Process Management	Distributed Applications	FileNet Services	GIS Services	Information Systems Security	Internet, Intranet, & eGov Services	Mainframe Applications	PeopleSoft Services	Project Management Services	Public Safety Services	Qualtiy Assurance Services	Telecommunications Services	TOTAL PROPOSED	TOTAL QUALIFIED
1	22nd Century	х		х				Х	Х						4	4
2	ACD Telecom											*			1	0
3	AMDEC	х	х								х		х		4	4
4	American ITC	х	*	X				*			*		Х		6	3
5	Anteo	х								X					2	2
6	AssureIT		X												1	1
7	Bpro			X		X		X							3	3
8	CDM			X		X									2	2
9	Cedar Crestone									X					1	1
10	CelCorp	*		*			X				*		*		5	1
11	CoolSoft	X		Х					Х						3	3
12	DataMan USA	*	*					*	*		*		*		6	0
13	Datamatics	х							X		*				3	2
14	Dell	X													1	1
15	EMA	х	X	X			X							*	5	4
16	EMC	*	X				*	*			*				5	1
17	FusionWare	х	X	X			X	X			X		X		7	7
18	HSC	х	X	X			X				X		X		6	6
19	JHS					X									1	1
20	MM Development										X		X		2	2
21	MSI	Х					х	*			X				4	3
22	Nakoma									Х					1	1
23	Orchard Data					Х									1	1
24		X	X								X		Х		4	4
25	SnapApps			X				X							2	2
26	StrataCom	Х	Х	X							Х				4	4
27	Tecuity			Х				Х							2	2
28	WiseTek	X													1	1
-	TOTAL PROPOSED	17	10	12	0	4	6	9	4	3	12	1	8	1	87	
	TOTAL QUALIFIED	14	8	11	0	4	5	5	3	3	7	0	6	0		66

x = Submitted response and qualified* = Submitted response but did not qualify

SECTION III - SCORING CRITERIA

Responsive proposals were reviewed by the evaluation team utilizing the following "points-earned" matrix:

Proposal Organization	2%
Offeror Qualifications	33%
Project Experience	50%
References	15%
Total	100%

Breakdown:

Organization of Proposal	2% of points for a possible 2,000 points			
Category	Section of RFP	Point Value		
A. Sections	1.6.1.1	250		
B. Notebook	1.6.1.2	750		
C. Cover Letter	1.6.1.3	1,000		

Offeror Qualifications	33% of points for a possible 33,000 points			
Category	Section of RFP	Point Value		
A. Years in Business	4.1.1.1	1,000		
B. Training	4.1.1.2	2,000		
C. Managing the Contract	4.1.2.1	4,000		
D. Problem Resolution	4.1.2.2	4,000		
E. Communications	4.1.2.3	4,000		
F. Change Management Procedures	4.1.2.4	4,000		
G. Invoicing procedures	4.1.2.5	4,000		
H. Monthly Reporting	4.1.2.6	4,000		
I. Contract Office	4.1.2.7	2,000		
J. Contract Manager	4.1.3.1	1,000		
K. Contract Liaison	4.1.3.2	1,000		
L. State Government Experience	4.1.4	1,000		
M. Experience with Master Contracts	4.1.5	1,000		

Project Experience	50% of points for a possible 50,000 points				
	(25% for each of 2 projects)				

Category	Section of RFP	Point Value (ea	a) Point Value (total)
A. Customer	Appendix C	1,000	2,000
B. Project Description	Appendix C		
1. Project Title	Appendix C	0	0
2. Project Start and Complete Dates	Appendix C	1,000	2,000
3. Project Scope	Appendix C	500	1,000
4. Project Objectives	Appendix C	500	1,000
5. Project Stakeholders	Appendix C	1,000	2,000
6. Budget	Appendix C	1,000	2,000
7. Actual Cost	Appendix C	1,000	2,000
8. Methodologies	Appendix C	5,000	10,000
9. Company's Role	Appendix C	4,000	8,000
10. Risk	Appendix C	2,000	4,000
11. Project Status	Appendix C	3,000	6,000
D. Deliverables	Appendix C	5,000	10,000

References	15% of points for a possible 15,000 points				
Category	Section of RFP Point Value (ea) Point Value				
A. On Time	Attachment A	1,250	2,500		
B. Tasks as Required	Attachment A	1,250	2,500		
C. Knowledgeable	Attachment A	1,250	2,500		
D. Value	Attachment A	1,250	2,500		
E. Satisfied	Attachment A	1,250	2,500		
F. Use Again	Attachment A	1,250	2,500		

SECTION IV – ORGANIZATION OF THE PROPOSAL SCORING

A total of 2,000 points was available for the organization of the proposal. Offerors were highly encouraged to provide proposals in a three-ring binder (750 pts). Offerors were required to organize their proposal into sections that followed the format of the RFP, and the proposal was to have tabs separating each section and appendix (250 pts). A cover letter had to be supplied with each proposal. The cover letter was to identify all Service Categories for which they were applying (1,000 pts).

SECTION V – OFFEROR QUALIFICATIONS SCORING

The State is interested in the Offeror's years in business, training, contract management skills and experience, problem resolution skills, communications, change management procedures, invoicing procedures, monthly reporting, key contract personnel, state government experience, and experience with master contracts. Offerors were asked to thoroughly address questions in each of the categories. A total of 33,000 points was available.

Offeror responses for Qualifications and Project Experience were scored based on the following scoring matrix:

- **Superior Response (95-100%):** A superior response is a highly comprehensive, excellent reply that meets all of the requirements of the RFP. In addition, the response covers areas not originally addressed within the RFP and includes additional information and recommendations that would prove both valuable and beneficial to the agency.
- Good Response (85-94%): A good response meets all the requirements of the RFP and demonstrates in a clear and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.
- **Fair Response** (60-84%): A fair response minimally meets most requirements set forth in the RFP. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.
- **Failed Response** (0-59%): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated sufficient knowledge of the subject matter.

The items that the offerors were asked to address were:

<u>Years in Business (1,000 points).</u> Offerors were asked to specify how long the company submitting the proposal had been in the business of providing services similar to those requested in the RFP.

<u>Training (2,000 points).</u> Offerors were asked to describe their company's approach to training and to provide specific examples that illustrate the company's commitment to staff training.

<u>Contract Management (4,000 points)</u>. Offerors were asked to discuss how the contract would be managed and to address contract compliance, resources, responsibilities and project oversight.

<u>Problem Resolution (4,000 points).</u> Offerors were asked to describe their company's approach to problem resolution and to address problem reporting, resolution and escalation procedures.

<u>Communications (4,000 points).</u> Offers were asked to describe the mode and frequency of communications with their clients including staff availability, meetings, status updates, written documentation and any policy on returning phone calls and email.

<u>Change Management Procedures (4,000 points).</u> Offerors were asked to describe their change management procedures and to address if the procedures are documented and available to the State.

<u>Invoicing Procedures (4,000 points).</u> Offerors were asked to detail their invoicing procedures, for both fixed price projects and time/material projects.

<u>Monthly Reporting (4,000 points)</u>. Offerors were asked to describe their company's reporting methods, including project status and billing.

<u>Contract Office (2,000 points).</u> Offerors were required to identify the location of the office that would manage the contract and detail how they provide effective and efficient contract management from this location.

<u>Contract Manager (1,000 points)</u>. The Offeror's Contract Manager is the single point of contract for the State's Contract Manager. The Offeror's Contract Manager is responsible for the coordination of all contract issues, conflicts, or disagreements. The Offerors were required to submit the name and resume of their Contract Manager.

<u>Contract Liaison (1,000 points)</u>. The Contract Liaison is responsible for providing contract status reports by the 10th of each month to the State's CL. The Offerors were required to submit the name and resume of their CL.

<u>State Government Experience (1,000 points)</u>. The Offerors were asked to list and describe any previous experience their company had in working with state governments. Offerors were asked to list the number years of experience as well as a listing of at least three major projects relative to the Service Category for which they were applying.

Experience with Master Contracts (1,000 points). Offerors were asked to list and describe any previous experience they had with the MIS Services, Small Project Professional Services Provider, or Master Contract for IT Services Contracts for the State of Montana, or any experience with other governments (local, state, or federal) master services contracts. They were asked to indicate the name of the master contract and the entity that manages the contract. They were asked to indicate the number of years of experience with the master contract(s), and provide a listing of at least 3 major projects and include project description, date started, date completed, total cost, and the Offeror's role.

SECTION VI - PROJECT EXPERIENCE SCORING

Offerors were to provide information on two projects that they have completed within the Service Category proposed. 50,000 total points were available - 25,000 for each project. The projects submitted were to illustrate the Offeror's role in the project and their experience relative to the Service Category being offered. Preferred were projects that had been completed, are recent, and where the customer was a government entity. Such projects received higher scores. In the case of a project that is ongoing, they were to provide information regarding the current status of the project, such as milestones and completed deliverables. The RFP stressed that it was important they provide complete and detailed responses.

Project # (25,000 total possible pts)	Possible Points
A. Describe the customer, include: Name Location	1,000
Type of Entity (government, non-profit, financial, manufacturing, etc)	
1. Project title	0
Project start and complete dates	1,000
3. Project Scope	500
4. Project Objectives	500
5. Project Stakeholders	1,000
6a. What was the overall budget or estimated cost? 6b. What was the budget or estimated cost for your company's services?	1,000
7a. What was the final actual cost? 7b. What was the actual budget or estimated cost for your company's services?	1,000
8. Describe in detail the methodologies that you employed, with supporting documentation	5,000
9. Describe your company's role in the project. (Or Describe your role as an individual).	4,000
10. Describe any risk assessment performed for the project or any risk control utilized.	2,000
11. Describe how you track and report project status. Include frequency and audience.	3,000
11D. List and describe the deliverables of this project, and attach an example of one of the deliverables (i.e. one of the artifacts).	5,000
Total	25,000

SECTION VII - REFERENCES SCORING

Offerors were to submit a completed reference form for each project. The reference forms contained 6 statements. The customer completed the form by indicating a value 1 to 4 depending on their level of agreement with the statement. Customers signed the reference form and it was to be included in the proposal. Each reference had a possible 7,500 points, for 15,000 total points.

The Customer References were asked to rate the Offerors using the following scale:

Rating	Point Value
4 – Strongly Agree/Very Positive	1250
3 – Agree/Positive	938
2 – Neutral	625
1 – Disagree/ Negative	313

Customer references were asked to rate the Offeror's performance on the following:

- A. This company ensured the project deliverables were completed on time and within the agreed budget.
- B. This company provided the appropriate resources to the project.
- C. This company was knowledgeable in providing the services identified per the service Category above.
- D. The business relationship with this company was positive and cooperative, verses negative and adversarial.
- E. The company provided open, timely communications, and was responsive to our needs and requirements.
- F. I would choose to work with this company again.

SECTION VIII - RECOMMENDATION

The evaluation committee recommends that the State of Montana execute a contract with the Offerors as specified in the Service Category scoring tables that follow. The Offerors recommended are the ones highlighted in yellow and with a "YES" in the Make the Cut column.